

Spain
Portugal
1st Quarter 2017

DBCI



Digital Signage & DooH
Business Climate Index

The pulse of the Digital Signage
and DooH industry



invidis
CONSULTING



**digital
signage
summit
europe**

05-06 JULY 2017
MUNICH
GERMANY

invidis research
2017 ES 100



Stable positive Digital Signage business sentiment in the new year



Fig. 1: DBCI ES/PT 1st Quarter 2017 "business situation", n=15

Participants: n=15; Region: España & Portugal; Time frame: 2017 weeks 2-3

- The Digital Signage Business Climate Index in Spain and Portugal remains on the positive level it had since May 2016. However the index has seen a nominal decrease by 3,35 base points from 53,34 points to 49,99 base points. In total the Index is down by -27,5% year-on-year and by -6,3% compared to the previous survey.
- The current business situation shows a much better business sentiment in the industry - with neutral ratings reclining. However also the negative ratings have increased.
- On the other hand, the outlook towards the near future registered some increase in the conservative expectation for the business situation. Now 33% of the surveyed companies are expecting a *unchanged* business situation for their products and services within the next six months.

Further Research

- 53,4% of all companies in the Digital Signage market in the Spain and Portugal have hired new staff in 2016.
- Overall this has developed into a definite shortage of qualified personal. Companies are more and more concerned, how they can match recruiting with their growth strategy.

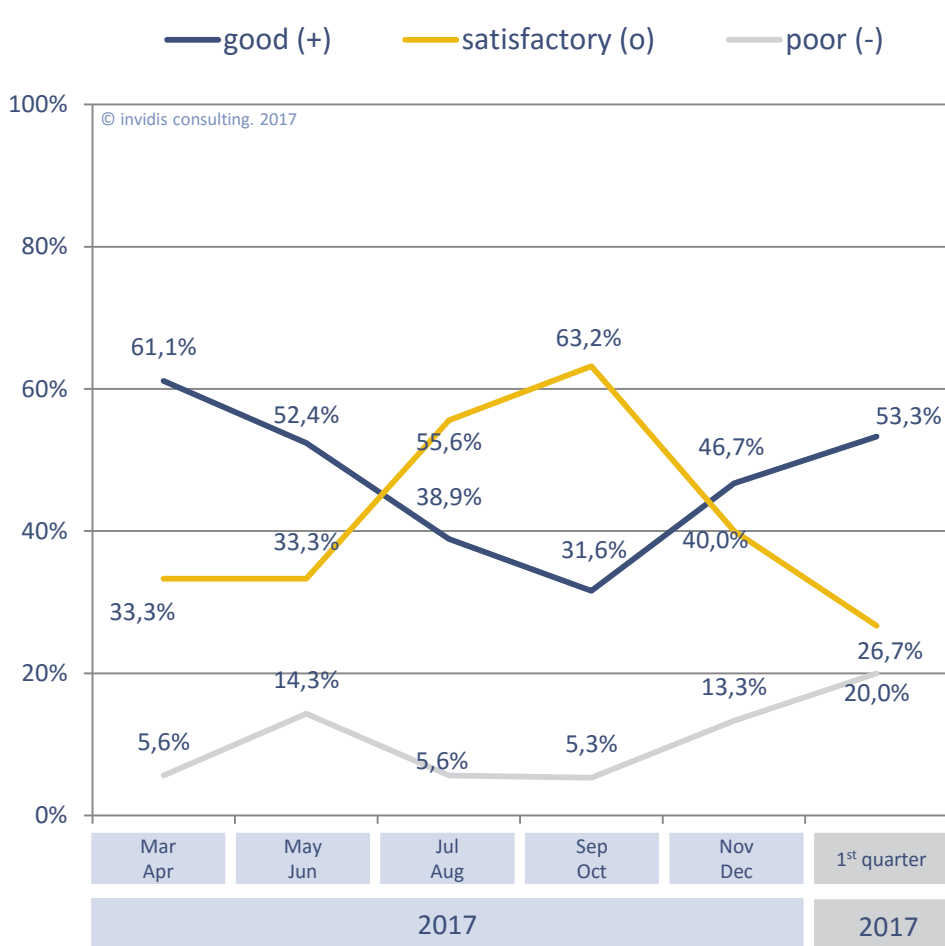
change
DBCI 2017 #1

year-on-year	previous survey
-27,5%	-6,3%



Better current business situation & increasingly conservative expectations

Current business Situation | ES/PT | 1st Quarter 2017



Outlook | ES/PT | 1st Quarter 2017

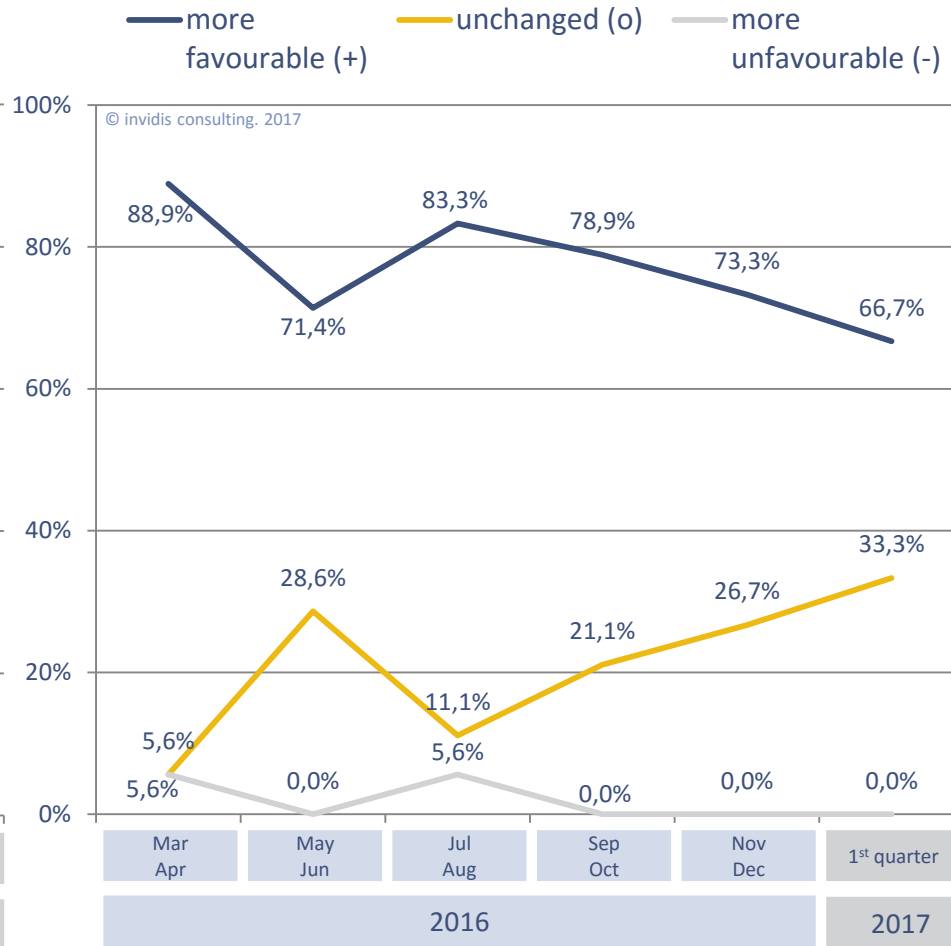


Fig. 2: DBCI ES/PT 1st Quarter 2017 „Business Situation ES“ rolling 12 months, n=15

Fig. 3: DBCI ES/PT 1st Quarter 2017 „Expectations ES“ rolling 12 months, n=15



Hirings 2016 | Digital Signage creates many new jobs

- 53,4% of all companies in the Digital Signage market in the Spain and Portugal have hired new staff in 2016. In total between 30-60 new jobs were created.
- The digital transformation in private and business life is responsible for an unbroken positive trend in the IT industry. Overall this has developed into a definite shortage of qualified personal. Companies are more and more concerned, how they can match recruiting with their growth strategy.
- As a whole there is a high demand for digital experts on all management levels. Particularly qualified project managers and key account positions are in demand. But also technicians, programmers and administrators can be difficult to hire in highly industrialised regions where the competition for talent is strong.
- The increasing expansion in vertical markets by Digital Signage companies leads to a demand for more professionals from different industry branches.

Company growth in new jobs created 2016

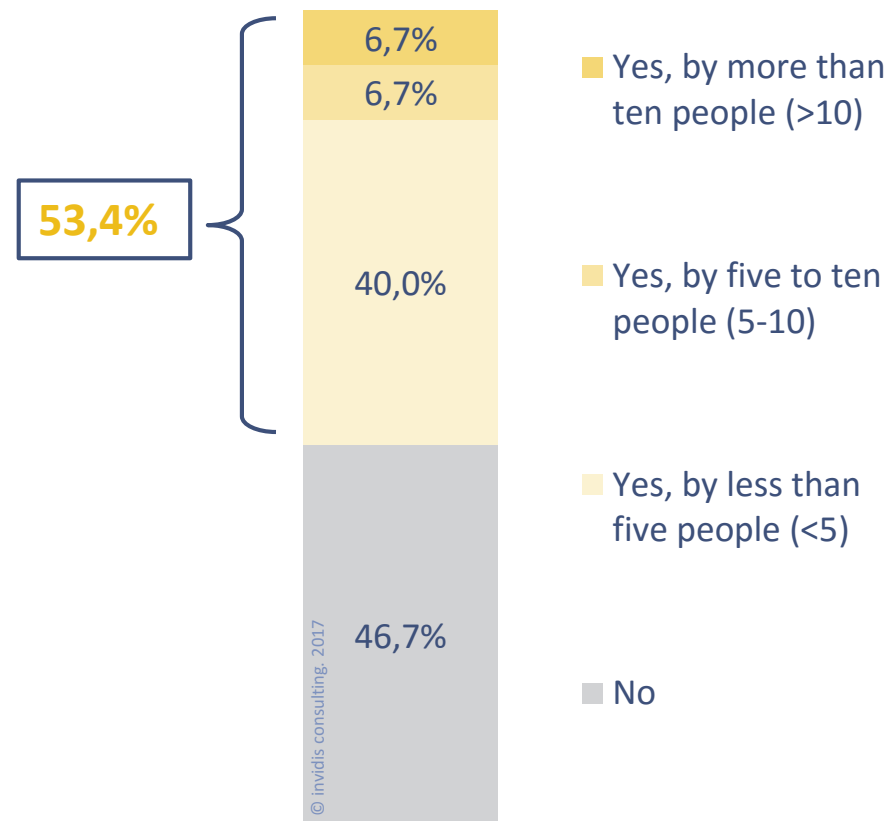


Fig. 4: DBCI ES/PT 1st Quarter 2017 "Hirings 2016", n=15



Roadmap 2017 & Contact

2017	
January	
February	
March	
April	
May	← 2 nd quarter 2017
June	
July	
August	← 3 rd quarter 2017
September	
October	
November	← 4 th quarter 2017
December	

- The DBCI has recalibrated its iteration from a two month period to a three month period starting in 2017
- The next survey will take place in calendar weeks 14-15 of 2017. The next planned publication date will be the first week of May 2017
- The DBCI is polled by invidis consulting and published in cooperation with DSF Europe
- If you are not yet part of the DBCI survey please contact us for further information
- The DBCI will be extended to other markets in 2017. For further information please contact Daniel Russell.

invidis consulting

invidis is a renowned boutique consulting and research house based in Munich. Delivering actionable information and advise to customers across EMEA.

Contact

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DSS | The Digital Signage Summit series



- «Digital Signage Summit» is the leading event series for digital signage conferences in EMEA and North America
- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and DooH topics
- Each event features visionary and best practise presentations as well as panel discussions concerning the most recent state of the art projects, trends and drivers of the industry
- All events also have a dedicated exhibition space for product presentation and networking opportunities
- Join us at one of our upcoming events in
 - DSS Orlando | Orlando: 14/16. June 2017
 - DSS Europe | Munich: 5.-6. July 2017
 - DSS MENA | Dubai: September 2017
 - DSS Russia | Moscow: October 2017
 - DSS Africa | Johannesburg: October 2017
- More information at digitalsignagesummit.org